



IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

Application of

Applicants : Barrott et al.  
Serial No. : 09/897,723  
Confirm. No. : 1125  
Filed : July 2, 2001  
Title : **COMPUTERIZED FAMILY ADVISING SYSTEM AND  
METHOD FOR MAKING FUNERAL ARRANGEMENTS**  
Docket No. : AUR 0014 IA  
Examiner : Fischer, Andrew J.  
Art Unit : 3627

Commissioner for Patents  
P.O. Box 1450  
Alexandria, VA 22313-1450

Sir:

**DECLARATION OF JOHN CHRISTOPHER BARROTT, NANCY KAY KOORS,  
AND CHARLES EARL DAY, JR. UNDER 37 C.F.R. 1.131**

J. Christopher Barrott, Nancy K. Koors, and Charles E. Day, Jr., the applicants in the above-identified patent application, declare as follows:

1. We are the co-inventors of pending claims 1-12 of the above-identified patent application, which is a continuation-in-part of U.S. application 09/409,566, filed September 30, 1999, and we are the inventors of the subject matter described and claimed therein.

2. The above-identified application is assigned to Aurora Casket Company, Inc., with whom we were employed on the filing date of this application.

3. We are familiar with the Office Action mailed August 24, 2004, including the rejections made by the Examiner therein. We are also familiar with the references cited by the Examiner in that Office Action, including Richardson (U.S. 2002/0022962 A1), and Torres et al. (U.S. 2002/0004757 A1).

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4. On a date prior to April 6, 2001, the filing date of the Torres et al. application, further on a date prior to December 29, 2000, the filing date of the Richardson application, and moreover on a date prior to May 28, 1999, the filing date of U.S. application 09/322,653 from which the Richardson application is a continuation-in-part, we had jointly conceived and reduced to practice the subject matter of claim 1 of this patent application. All of the acts reported below were carried out in the United States. As evidence of the conception and reduction to practice of the invention, we submit the following exhibits. As permitted by present practice, the date of each exhibit has been obscured.

Exhibit A is a press release from Aurora Casket Company, which announced the product incorporating the recited invention, which was demonstrated at the National Funeral Directors Association convention prior to May 28, 1999.

Exhibit B is a publication which describes the stir created in the funeral service industry by the product incorporating the recited invention and its selling price prior to May 28, 1999. In particular, the publication mentions the computerized method of the present invention for presenting, searching, selecting, and maintaining funeral arrangement information contained in a database. Further, the publication provides details to the funeral arrangement planning system of the present invention having the ability to interactively guide a user through the funeral planning process, and permitting the user to electronically select funeral products and services prior to May 28, 1999. Moreover, the publication mentions that the product incorporating the recited invention had been installed at four funeral homes prior to May 28, 1999.

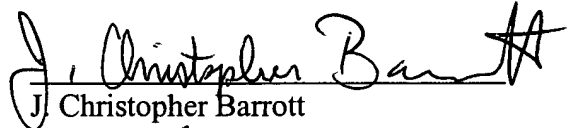
Exhibit C is the training manual that was provided with the product incorporating the recited invention prior to May 28, 1999.

5. Although Exhibit A states the “[s]ince 1995, Aurora has steadily built the concept of interactive funeral planning and has applied customer input into ever phase of the Family Advisor project,” the recited features of the claimed invention were neither

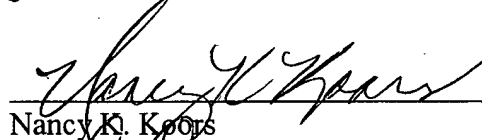
previewed nor available to the public until the demonstration at the above-mentioned National Funeral Directors Association convention. Additionally, the filing of the above-identified parent application from which priority is based on at least claim 1, occurred less than one year from our disclosure at that convention.

We hereby declare that all statements made herein of our own knowledge are true and that all statements made on information and belief are believed to be true; and further that these statements were made with the knowledge that willful and false statements and the like so made are punishable by fine or imprisonment, or both, under Section 1001 of Title 18 of the United States Code, and that such willful false statements may jeopardize the validity of the application and any patent issued thereon.

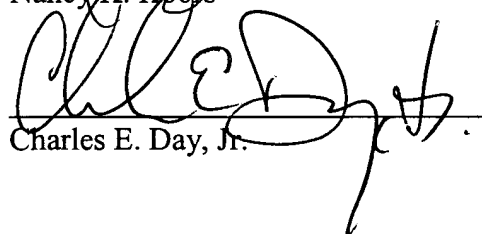
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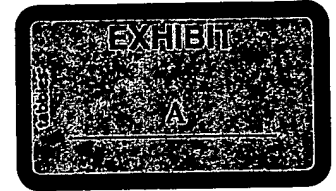
  
J. Christopher Barrott

Date: 10/14/04

  
Nancy K. Koons

Date: 10/20/04

  
Charles E. Day, Jr.



## Press Release

For more information, call:  
Jason Barrott  
Dave Lane (513) 979-5263  
888 449-5263

October 26, 1998

# AURORA UNVEILS LEADING EDGE TECHNOLOGY AT NFDA CONVENTION

**Boston, Massachusetts** - Aurora Casket Company introduced *Family Advisor* as the National Funeral Directors Association kicked-off its 1998 convention today.

Aurora's *Family Advisor* is a state-of-the-art interactive project designed specifically for funeral service. Customer demand was the catalyst for the development of the project. Since 1995, Aurora has steadily built the concept of interactive funeral planning and has applied customer input into every phase of the *Family Advisor* project.

"As we embark upon a new millennium, we are forced to reconsider how to best utilize the resources we have available. *Family Advisor* is not only innovative but it renders other merchandising systems obsolete," said Chris Barrott, executive vice president of operations for Aurora.

As a merchandising tool, *Family Advisor* allows funeral directors to present preneed and at need funeral planning to families in a comfortable, relaxed setting. Caskets, services and related products are displayed on a 36-inch full color computer monitor utilizing mixed media. Seated around a custom designed conferencing center, families can view and ask questions about every aspect of the planning process. The funeral director has the option of answering questions either personally, with the aid of specific imagery or by elaboration using video presentations produced for specific issues.

"Ultimately, the result will be a better informed consumer. That means families are less stressed during the decision making process and eventually will be more satisfied with their selection," added Barrott. "For the funeral director, it means more revenue potential and less need for selection room inventory."

*Family Advisor* also offers funeral directors innovative features that can revolutionize funeral home management at an affordable cost, well below many product display systems currently on the market. Additionally, versatility and simple updates allow the *Family Advisor* to evolve and stay current with market changes. On-line capabilities will provide access to Aurora established web sites providing information on available products, continuing education programs and other management services.

For a *Family Advisor* demonstration, visit the Aurora exhibit at the NFDA convention, booth #3311 or call 800 457-1111.

###

FYI

Dave Lane

# ADVANCED TECHNOLOGY = INCREASED SALES

## AURORA'S INTERACTIVE MERCHANDISING SYSTEM FACILITATES PLANNING PROCESS

BY HELEN K. KELLEY

A new product from Aurora Casket Company, introduced at last October's NFDA Convention, has begun creating a stir in the funeral service industry. The Family Advisor, a state-of-the-art interactive project designed specifically for funeral service, serves both as an educational tool and a nearly-seamless merchandising system.

As a merchandising tool, Family Advisor allows funeral directors to present preneed and at-need funeral planning to families in a comfortable, relaxed setting. Seated around a custom-designed conferencing center, families can view a multi-media presentation of the funeral home's caskets, services and related products on a color computer monitor. In this manner, the family can ask questions about every aspect of the planning process as the presentation progresses, and the funeral director has the option of answering those questions personally, or using video presentations that address specific issues.

"Family Advisor assists the funeral director in taking the family through all the service and product selections, one by one," says Nancy Koors, Aurora's director of Internet marketing. "The goal is for the funeral director to be able to make all of the arrangements through one streamlined process." In addition, the system also allows funeral directors to customize certain areas of the presentation, such as product descriptions and pricing, to meet their specific needs.

The Family Advisor also facilitates the planning process by educating the families, making them better informed and taking the anxiety out of their decision-making. The system's built-in selection guide helps the family make appropriate selections for their loved one by inquiring about things such as preference for traditional or contemporary style, religious traditions and even color preferences. The selection guide prompts the funeral director to ask questions about these preferences, and based on the answers the family gives, the funeral director can narrow down a selection of caskets, urns or other products to display on-screen. Families also have the option to bypass certain products and services

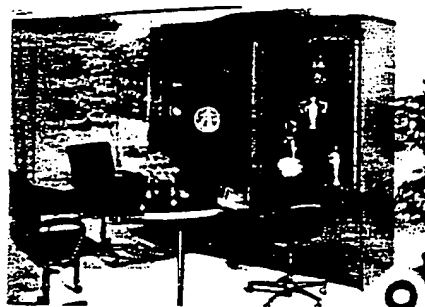
and get detailed information about the ones in which they're interested.

"Ultimately, the result will be a better informed consumer," explains Chris Barrott, executive vice president of operations for Aurora. "Families are less stressed during the decision making process and eventually will be more satisfied with their selection." For the funeral director, this kind of informed decision-making may result in more revenue potential. With its detailed descriptions and pictures, the system is able to communicate the value of higher-end products. "Hopefully, by incorporating education, the presentation will assist the family in feeling good about a decision to purchase a higher-end product, rather than feeling ripped off," says Koors.

The Family Advisor system can also produce savings for the funeral home. A compact selection system like this can eliminate the need for a selection room — thereby freeing

up that space for other uses — as well as display caskets that represent thousands of dollars in tied-up inventory.

Caskets, services and related products are displayed on a 36-inch full color computer monitor utilizing mixed media; the family views the presentation on the monitor and makes their selections. Funeral homes can choose from four different Family Advisor system packages. The basic Software Hardware Package includes a Gateway PC, 36" monitor and arrangement software; the Multi Media Conference Package includes the Software Hardware package elements, plus a video cabinet, conference tables and chairs; the Arrangement Office Package offers all of the previously mentioned items, along with a cremation urn display cabinet with lighting; and finally, the Selection Room Package offers the same as the Arrangement Office Package, plus a custom casket cabinet with lighting. A fifth package, which is custom-designed for a laptop computer, includes a Gateway laptop, with Family Advisor hardware and software. The furniture, made



by Steelcase, a leading office furniture supply company, is of fine craftsmanship, has eye appeal and versatility, and can be configured to meet space and budgetary requirements.

One of Aurora's key markets for the Family Advisor is funeral homes that have limited space for a selection room. Funeral homes with multiple locations or satellite offices might also find this system useful, in that they can retain a selection room at one location, while having the interactive system available at their remaining locations.

Larger funeral homes may find that utilizing such a system provides more consistency among its salespeople. "By using the interactive presentation and customizing it for their business, funeral directors can guarantee that all of their arrangers are educating families in the same way with the same information," states Koors. "It's an additional way of ensuring that the family feels confident in their decision."

Since its premier at the NFDA Convention, improvements and enhancements have been made to the Family Advisor. It is currently being test-marketed at four funeral homes, two each in Ohio and Indiana; only one of the four currently has an actual selection room. After the test period, the system will go on the market at large.

Koors notes that a version of the program will be designed for laptop computers as a sales tool. "Sometimes the funeral home's conference room is just not large enough when people bring their entire family in," she explains. "By taking the laptop into

the family's home, you can accommodate more people in their comfortable environment."

Another creative innovation of the Family Advisor is an automatic Internet connectivity feature. This allows the system to dial into Aurora's database and automatically download any new information and inventory selections. If a particular casket or product is out of stock, Aurora will automatically pull it from the funeral director's list of choices so that the item does not show up during

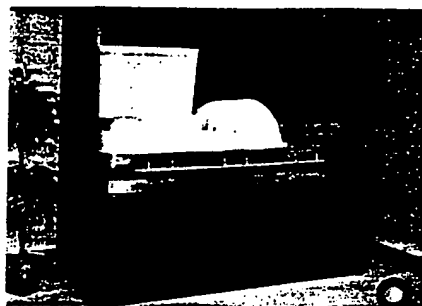
a presentation. The dial-in feature also allows the Family Advisor system to record the family's selections in a database for record-keeping, and will automatically place the orders online to Aurora.

The system's versatility allows it to evolve and stay current with market changes. Once a funeral director purchases the Family Advisor, he will receive upgrades to the system at no additional cost.

As software enhancements are developed, they will be sent to existing customers either on disk or through an Internet download, ensuring that the latest version is in use. "This system was designed to prevent against obsolescence," says Koors. "And customers don't have to worry about constantly upgrading their selection rooms. They have the newest products and services online."

The Family Business Advisor sells in packages starting at \$8,450. For more information about the system, call Aurora Casket Company, (800) 457-1111, or speak to your sales representative.

*Helen K. Kelley is a freelance writer in Atlanta, Ga.*



*Miller-Meteor*  
CORPORATION



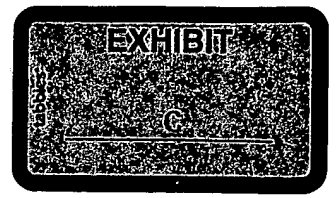
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# FAMILY ADVISOR TRAINING MANUAL



## **Quick Reference Guide**

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## Key Terms:

**Toolbar** – The “toolbar” to the left of the screen. This is used to move throughout the system.

**Click** – to select an item located on the screen, you must move the pointer to the desired item, then press one of the following two buttons:

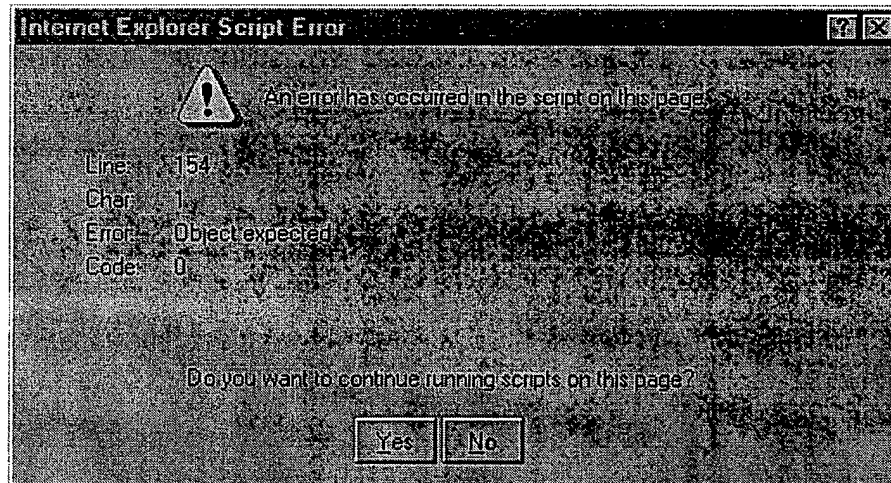
1. The “trigger” located underneath the remote.
2. The left button directly under the trackball on the remote

**Homepage** – The initial screen (Director’s Menu) that appears at the beginning of the system.

**Text box/field** – The space provided for entering the requested information

**Drop-down List box/arrow** – The arrow to the right of the text box/field that lists the options for that field.

**Errors** – If you experience script errors, choose yes and click continue. You are most likely navigating through the system too quickly. The page must be fully loaded prior to moving to the next screen.



## INTRODUCTION

Welcome to The Family Advisor by Aurora. This state-of-the-art interactive system was designed specifically for funeral service. The Family Advisor is a helpful tool that assists funeral directors in the planning of at-need or pre-need funeral services. This educational system allows families to gain knowledge and ask questions about every aspect of the funeral planning process. The relaxed setting offered by the custom-designed conferencing center, provides families' comfort in selecting services, caskets, and related products. Better-informed consumers prove to be more satisfied with their decisions.

Funeral directors benefit from the Family Advisor by increasing revenue potential, and decreasing costs by having increased inventory without the need for showroom space. The Family Advisor will enhance profitability while increasing care and comfort to the families served. The funeral planning process has been made easier, and yet, more sophisticated.

Aurora realizes that security and confidentiality is of utmost importance to your business and ours, therefore, we have taken precautions to insure that this system is secure and reliable.

The Family Advisor program uses FTP (File Transfer Protocol) to transfer information from the Family Advisor System to Aurora Casket's Database on the server. Order information is limited to restricted directories on the server in a "write only" mode. This gives your system the ability to add data to Aurora Casket's Database without the ability to read any other customer's data. Aurora Casket inventory data is also available via FTP to the customer. This process is limited to Inventory data only in a "read only" mode.

Both portions of the program use **Microsoft NT's FTP user name and password** for security and this access is located behind **Check Point Firewall** which is monitored 24 hours a day 7 days per week.

### **Tips:**

The user guide follows the same paths as shown on the toolbar. The system paths, and the toolbar, will be slightly different depending on the disposition selected on the "Family Services Selection Guide". Several of the screens in the system are the same regardless of the disposition, therefore, those screens and the process are duplicated in the user guide.

There are also several "optional" screens throughout the selection room. These are intended to provide information and education to the family. Those screens are marked with an "**Optional Screen**" designation. These screens are not part of the toolbar and are not "required" to get to the next screen.

## **GETTING STARTED**

After turning on the system, the initial screen that appears is the “homepage” or Directors Menu. At anytime while using the system, you can return to this screen by clicking on the Family Advisor logo located on the toolbar to the left of the screen. This toolbar contains a menu of options for operating the system.

The options, which are discussed in detail throughout this guide, are listed as follows:

**Selection room-** The Selection Room is the primary tool used when making funeral arrangements with a family. It guides and educates the family through each step of the process.



**The areas listed below are administrative areas and NOT intended for the family. These areas contain sensitive business information. It is vital that information is entered into these areas or you will experience errors in the selection room.**

**Services-** Allows you to enter your general price list of the services offered by your funeral home.

**Products-** Allows you to select the products that you would like to have in your “virtual inventory”.

**Customers-** Allows you to access customer records/account information.

**Cash Advances-** Allows you to post any third party services that require payment at the time of the arrangement.

**Setup-** Lists your funeral home information and also acts as a link to computer setup, contract and disclosure information.

**Shipping Addresses -** Allows you to list the location(s) where the products are delivered.

**Order/Update -** Allows you to order the selected products online from Aurora.

**Inventory Update-** Designed to update your system with current inventory in your service center. This is only necessary for at-need services.

**Casket Price List-** Allows you to maintain up-to-date price lists of your casket merchandise selections.

**Urn Price List-** Allow you to maintain up-to-date price lists of your urn merchandise selections.

**Service Price List-** Allows you to print your General Price List.

## System Administration

Many of the administrative areas just described are password protected to insure confidentiality. To access these areas, simply type in your user name and password in the appropriate fields and then click on the "Log in" button. Once you enter the password, the field will fill with \*\*\*\* to guard against anyone seeing the password that you enter.

Once you enter an administrative area, the other administrative areas will not prompt for a password. To insure password protection is activated, click on the Family Advisor logo on the navigation bar after completing any changes/additions. You can change the password on the setup screen as often as desired. If you forget your user name or password, call Aurora Answers and a new one will be sent to you via email.

**First Time Users:** If you are entering Family Advisor for the first time, please go to page 9 and follow the instructions for the Funeral Home Setup page. After you have completed Setup, click on Services to continue your administrative setup. Once these areas are complete, you can return to this point in the training manual.

## SERVICES

Click on the services bar located directly below the selection room on the toolbar. This area allows you to enter a list of the current services offered by your funeral home. This screen lets you determine the service description and price as well as display your itemized price list. Services may be added, deleted, and edited as necessary.

Service	Price	Tax
Funeral Home	\$1000.00	
Burial	\$400.00	

Service: \_\_\_\_\_ Price: \_\_\_\_\_ Tax: ☐

### To Add Services:

1. Click on the blank text box called SERVICE, until cursor appears.
2. Type in the service description, as it should appear to the family.
3. Click on blank text box called PRICE, until cursor appears. Enter desired price.
4. If the service is taxable, click the blank box called TAX or tap the space bar once (if service is not taxable, do not select this box).
5. Choose a service category: Packages, Services, Facility/Transportation, Merchandise.
6. If you would like to provide further information on the service offering, enter a service description in the Service Description Text Box.
7. Click on the Add Service box at the bottom of the screen. The newly added service will appear in the list.

8. When all additions are completed, click on SAVE SERVICES on the toolbar.

### **To Delete Services:**

1. Click on the service you would like to delete. The selected service will be highlighted.
2. Click on “delete service” at bottom of page. The service will be removed from the list.
3. When all changes are completed, click on SAVE SERVICES on the toolbar.

### **To Edit Service:**


1. Click on the service you would like to edit. The selected will be highlighted.
2. Click on the edit service box at bottom of screen
3. Click on the text box until cursor appears. Make changes accordingly.
4. At the bottom of screen, click either SAVE SERVICE or CANCEL EDITING.

### **Rearranging Items in the Service Box**

1. Click on the service that should be moved. The selected service will be highlighted.
2. Click the up and down arrows located to the left of the viewbox.  
These arrows will move your selected item up or down the list.
3. When changes are complete, click on the SAVE SERVICES on the toolbar.

## **PRODUCTS**

This page contains all Aurora products available to you from your service center and allows you to indicate what products you would like to present to a family. The pages are indexed according to product type: metal caskets, wood caskets and urns. To browse through the products available in each category, click on the appropriate icon at the bottom of the page. Each category has multiple pages that are listed at the bottom of your screen.

**To select a product,** simply put the mouse on the circle to the left of the product code and click until the Aurora logo  appears.

**To deselect a product,** simply click the Aurora logo located to the left of the appropriate product. An empty circle will replace it. If the Aurora logo is not present to the left of the product, this product will never be shown to a family.

Products labeled with an Aurora logo will be shown in the selection room process. If you are not familiar with the product and would like to view it, simply click on the product code. Once you have viewed the product, click on “Close” to return to the product selection screen.

## Metal Casket Product Selection

	Product Code	Product	Material Type	Price	Retail	Markup	Margin	QTY Sold	Pop
<input checked="" type="radio"/>	A28160	2889 Regal Brushed 2490T Sandalwood Premium Velvet GM	Bronze	\$3,379.00	<input type="text" value="\$5,000.00"/>	1.48	\$1,621.00	51	<input checked="" type="checkbox"/>
<input type="radio"/>	A22855	2299 Glacier Blue Brushed 2601 Blue Premium Velvet G & B/M	Bronze	\$2,284.00	<input type="text" value="\$5,000.00"/>	2.19	\$2,716.00	1	<input type="checkbox"/>

After selecting the product, you will set your retail price. This is the pricing that will appear in the selection room to be viewed by the family. Simply key in the desired retail price and click anywhere outside the box. The system will automatically default the retail price to equal the wholesale price, so make sure that you determine the appropriate retail price. The margin and mark-up will calculate automatically.

The Pop column allows you to mark your most popular caskets. In the Selection Room, the family can either view your most popular items or they can choose selection criteria to match a casket to their preferences.

After completing the retail price/Pop on **each** page, choose SAVE SELECTION on the navigation bar. **EACH page must be saved individually. Do not leave the page until you have saved your changes.**

After saving, a Data Saved Successfully message will appear. Select "OK" when the message appears. Due to caching issues with Internet Explorer, you may not see an immediate update to your product screen. **As long as the Data Saved Successfully box appears, your selections have been saved.** You can refresh your screen by changing pages or right clicking on your mouse and choosing refresh.

## Customers

This page contains the database of customers that have made arrangements via Family Advisor. This can be very useful for referencing prior arrangements. For example, the Smith family would like to use the same funeral arrangements for Aunt Betty as they did for Uncle Bob. The funeral director has the option to view Uncle Bob's funeral arrangements (services and products) as a reference.

**To search for a customer record:**

1. Choose the letter of the last name on the list at the top of the screen. Once you choose a letter, the list of customers in the database whose last name ends with that letter will appear.
2. Click on the customer name to view the record.

**Customer List**

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Jared, Miller	12345
---------------	-------

To search for another customer, click on the “Customers” button on the toolbar to the left and repeat the process.

To delete the record, click on DELETE CUSTOMER on the toolbar.

- The customer record will show products, services purchased and cash advances paid, as well as the date, account number and arrangement type. If the arrangement was a pre-need, you’ll see a button labeled “Change to At-Need”. To change, simply click on the button. The system will verify that you want to complete the process. Click on yes. The next screen that appears will be the order screen. See “Order/Update”, page 21. Once the order is placed, the customer record will record the date of the at-need arrangement as well.

## Cash Advances

This section is a payment tool that allows you to enter information on payments that are to be made at the arrangement process. To access this screen, simply click on the “Cash Advances” bar on the Director’s Menu. To add, delete or edit cash advancements, click on the desired option on the bottom of the page.

1. To **add** an advance, type in the description in the Cash Advance text beneath the list box. Click on the “Add Item” bar to add the cash advance to the list box. When you have finished adding items, click on “Save all Items”.
2. To **delete** an item, highlight the desired item in the list box. Then click on the “Delete Item” bar. When you have finished deleting items, click on “Save all Items”.
3. To **edit** cash advances, highlight the appropriate advance, then click on the “Edit Item” bar. The advance will appear in the cash advance text box. Edit accordingly and save the item after necessary changes or cancel the editing by clicking on the appropriate bars.

Cash Advance	<input style="width: 95%;" type="text"/>
Add Item	Delete Item
Edit Item	



## Setup

To access the setup area, click “Setup” located in the center of the Director’s Menu on the homepage. The Funeral Home Setup page will appear. This screen establishes the necessary communication/system information to obtain updates. This page provides space to enter information regarding your funeral home. This page also allows input of contract and disclosure information and sets up the tax rate for products and services.

To enter information in the blank text boxes, click the appropriate box. Type in the requested information regarding the following options:

**Funeral Home Name** – Enter the name of business.

**Aurora Account #** - Enter account #.

**Address 1** – Enter address.

**Address 2** – Enter address.

**City** – Enter city.

**State** – Enter state.

**Postal Code (zip code)** – Enter zip code.

**Phone** – Enter phone number.

**Fax** – Enter fax number.

**Internet Address** – Enter Internet address (e.g. www.funeralplan.com)

**Email** – Enter email address.

**Services Tax Rate** – Enter appropriate state tax rate for services.

**Products Tax Rate** – Enter appropriate state tax rate for products.

**User Name** – Enter any combination of letters and/or numbers. Aurora recommends using a minimum of 4 letters and/or numbers. This can be changed as often as desired.

**Password** – Enter any combination of letters and/or numbers. Aurora recommends using a minimum of 4 letters and/or numbers. This can be changed as often as desired. This field will fill with \*\*\*\*, once the password is entered.

**Display Total Prices**- If you select “No”, the family will only see the price of the product displayed in the selection room. If “Yes”, prices for product, service and a grand total will be shown in the selection room.

The screenshot shows a web form titled "Funeral Home Setup". It contains the following fields, each with a small asterisk to its right indicating it is required:

- Funeral Home Name: [text box]
- Aurora Account #: [text box]
- Address1: [text box]
- Address2: [text box]
- City: [text box]
- State: [text box]
- Postal Code: [text box]
- Phone: [text box]
- Fax: [text box]
- Internet Address: [text box]
- Email: [text box]
- Services Tax Rate: [text box] % \*
- Products Tax Rate: [text box] % \*
- Username: [text box] % \* (pre-filled with "aurora")
- Password: [text box] % \* (pre-filled with "password")

At the bottom left, there is a note: "\* Denotes a required field."

**Computer Setup** – Located under “Save Setup” on the toolbar, this area will be set up at installation by Aurora. Do not change any information on this screen, as it will affect your updates.

The **Contract Information** window appears at the bottom of the page. This window is used to store the contract that serves as the legal binding agreement between the funeral home and the family. Click on the window until the cursor appears, then enter the contractual document text. At any time, the contract can be edited by clicking in the window and typing any changes. When the contract has been entered, click “Save Setup” to exit the window.

If contract information does not need to be altered, this area may be bypassed by clicking “Save Setup” on the Funeral Home Setup screen. This will return to the home page.

The “Computer Setup” information and the “Contract Info” can be hidden (taken off the screen) by clicking “Hide Computer Setup” or “Hide Contract Info” at the bottom of the Director’s Screen.

**Disclosure Information** provides your funeral home’s disclosure information in each service category of the selection process.

When the correct information has been entered, click “Save Setup” on the left of the page.

**Updating Funeral Home Setup:** You can update the setup fields at any time by clicking on the Setup button and editing the desired field.

## Shipping Addresses

This screen allows you to enter the locations where you would like the products delivered.

### **To enter a new location:**

1. Key in the required information by putting the cursor in the appropriate field and typing in the information. The following fields are required: Location, Name, address, city/state/zip, phone.
2. Click on the New Address icon at the bottom of the screen.
3. When finished, click on SAVE ADDRESSES on the toolbar.

The screenshot shows a web form titled "Shipping Addresses". It contains several input fields with labels: "Location Name:", "Address1:", "Address2:", "City / State / Zip:", "Phone:", "Fax:", "Internet Address:", and "Email:". Asterisks (\*) are placed next to Address1, Address2, City / State / Zip, and Phone, indicating they are required fields. Below the input fields, there is a legend that says "\* Denotes a required field". At the bottom of the form, there are three buttons: "Add Address", "Delete Address", and "Edit Address".

**To edit an existing shipping address:**

1. Click on the location name in the text box. This will populate the existing information for that location in the required fields.
2. Edit the necessary fields by clicking on the field with the cursor and typing in the new information.
3. When the changes are completed, click on the Save Address icon at the bottom of the screen. Edit one or more of your addresses.
4. Click on SAVE ADDRESSES on the toolbar.

**To delete a location:**

1. Click on the location name in the text box.
2. Select the Delete Address icon at the bottom of the screen.
3. Click on SAVE ADDRESSES on the toolbar.

**Order/Update**

This screen should be utilized after the selection room process. If no orders are listed, then no orders are pending. **If orders are listed, they are pending and have not been sent to Aurora.** To submit and upload an order, see Order/Update page 21.

**Inventory Update**

Prior to an at-need conference, click on Inventory Update to update your system with those products currently available in the service center. This file is downloaded from the service center that serves you. Once you click on the toolbar on the Director's Menu, the system will dial into Aurora's system and transmit the file to your system. **Note:** If you are using a modem with dial-up networking, you should see the dial-up networking box and hear the system dial. If you are using a LAN, multiple windows will open at the bottom of your screen.

**Casket Price List**

The "Casket Price List" lists your casket retail pricing, descriptions and materials to allow you to print, at any time, the required FTC list of caskets in inventory. When you click on the "Casket Price List" toolbar, the price list will first appear covered by a "Print Document" screen. To print, click "OK".

To return to the Director's Menu, select your "Back" key on the Internet Explorer toolbar or right click your mouse and choose "Back".

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**Aurora Casket Company  
Casket Price List**

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<u>Product Description</u>	<u>Material</u>	<u>Price</u>
2889 Regal Brushed 2490T Sandalwood Premium Velvet GM	Bronze	\$5000
2199 Dark Brushed Copper 2501C Rosetan Premium Velvet CM	Copper	\$5000
3836 Light Brushed 1524T Silver Premium Velvet AS	Stainless Steel	\$2750
5700 Westminster Solid Oak 9140 Camelia Velvet	Oak	\$2500
4304 Testament Solid Oak 5760 Rosetan Bellaire Crepe	Oak	\$2500

## **Urn Price List**

The “Urn Price List” is the same format as the “Casket Price List”. It lists each urn in your inventory along with its description, price and material. When you click on the “Urn Price List” toolbar, this screen will first appear covered by a “Print Document” screen. This allows you to print the FTC required price list. To print, click “OK”. To return to the Director’s Menu, select the “Back” key or right click your mouse and select “Back”.

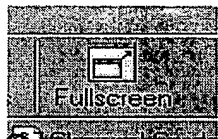
## **Services Price List**

This feature allows you to print your GPL. As with the previous two price lists, there is a printing option that appears before viewing the screen. To print, click “OK” on the print screen. It describes the services you provide and details service descriptions and prices. To return to the Director’s Menu, select your “Back” key on the Internet toolbar or right click your mouse and select “Back”.

## **SELECTION ROOM**

**For at-need services**, click on Inventory Update prior to entering the selection room. After update is complete, click on Selection Room. **Note:** If you are using a modem with dial-up networking, you should see the dial-up networking box and hear the system dial. If you are using a LAN, multiple windows will open at the bottom of your screen.

Please select the fullscreen option on Internet Explorer. To select the fullscreen option, press the F11 key on the keyboard or click on the icon on the toolbar. To deselect fullscreen, press F11 again.

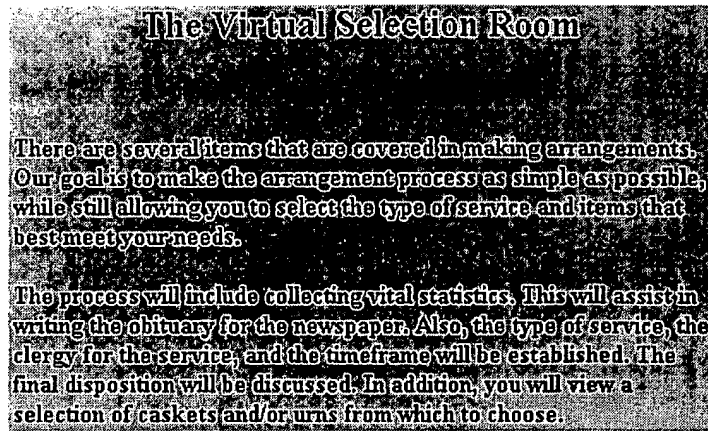


The selection room contains the arrangement information. Once you click the selection room option, a “splash” screen featuring the Family Advisor logo will appear. It is necessary to enter through this screen **prior to each arrangement**, as this screen synchronizes the databases necessary to operate the system.

## **Virtual Selection Room Introduction**

This screen gives a short introduction and overview of the Family Advisor system and the funeral arrangement process. Use this screen as an opportunity to inform the family of what will be accomplished during the arrangement process. Click “continue” to demonstrate The Family Advisor after introducing the family to the process and the system.

If you want to place an actual pre-need or at-need order, click on “Biographical Information”.



## Biographical Information

This screen is for entering biographical information. You have the choice to use an existing record or to enter a new name with an Account/ID #.

Using an existing record will allow you to reference all prior funeral arrangements made for that individual using this system.

## System Note:

If the system sits idle for 15 minutes or longer while you are entering customer data, information pertaining to the current customer will be lost. System idle is when there is no activity such as entering data, changing screens or displaying images. This will force you to go back to the "Biographical Information" page and retrieve the customer's account information. Each step will have to be re-entered to get back to the point you were at the time of idle.

### To access the existing records

Click on the down arrow located to the right of the text box. By clicking this arrow a drop down list will appear. Use the pointer to click on the desired name or account number. When the name is highlighted in the "existing record" box, click "continue".

### To enter a new name

1. Click once on the name text box until a cursor appears.
2. Type in the last name of the deceased or of the person that is making pre-need arrangements then tab to the next field and type in the first name.
3. Type in the Account/ID #. This can be the account number from the accounting package that you currently use. There are no field length requirements for this field.
4. Type in the date. NOTE: We recommend entering the contract date for pre-need arrangements. For at-need arrangements, type in the date-of-death, date of service or arrangement date but be consistent with your designations.

5. Check the pre-planning box if the person is making pre-planning arrangements (inventory will not be checked). If making at-need arrangements, leave this box blank. This will allow the system to check current inventory levels. If product is temporarily unavailable, the product will not be shown in the selection room.
6. Click "Continue".

Pre-Planning: ☒

## Family Services Selection Guide

The purpose of this screen is to discuss the family's options for services and allow them to choose those services that meet their needs. To answer the questions, click on one or more of the options below each question until the Aurora logo appears.

**Family Services Selection Guide**

Have you determined the disposition?

☐ Burial ☐ Cremation

There are several types of services available to you. You can have a viewing, funeral ceremony, memorial service, graveside service or a combination of services. What type of service(s) are you interested in holding?

☐ Viewing ☐ Funeral Ceremony  
☐ Memorial Service ☐ Graveside Service

The traditional ceremony is held over a two-day period. This normally includes the viewing in the evening with the ceremony the following day or you can have the services in one day. Which do you prefer?

☐ Multiple Days ☐ One Day

The services can be held at our facility or at a facility of your choice. Families sometimes choose their place of worship to hold the services. Where would you like to conduct the services?

☐ Viewing - Funeral Home ☐ Viewing - Other Facility  
☐ Funeral Ceremony - Funeral Home ☐ Funeral Ceremony - Other Facility  
☐ Memorial Service - Funeral Home ☐ Memorial Service - Other Facility

If cremation is selected, see page 23.

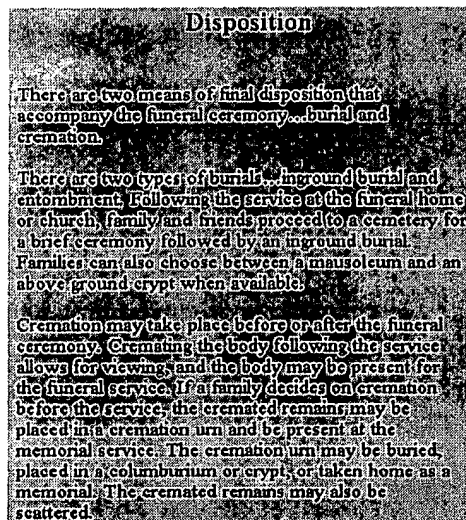
If burial is selected, please continue.

For more information on disposition and funeral service options, click on the appropriate subject bar located on the toolbar. These information screens are optional (see descriptions below). Consumer Research indicates that this information is especially helpful in making pre-need arrangements. These screens can also be used during an at-need arrangement if a family has questions regarding the types of services or has difficulty making a decision.

## Disposition - \*Optional Screen

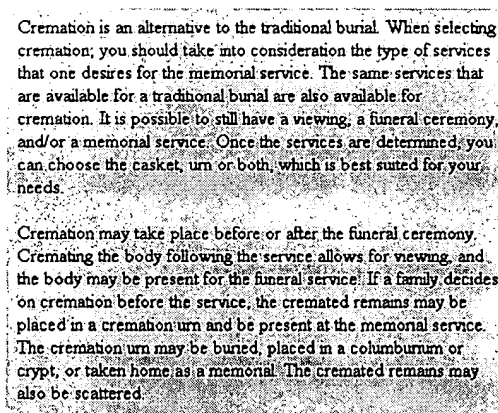
To access this screen click on the word Disposition on the toolbar. This screen provides information on the disposition options so that you can discuss the options with the family.

After reviewing the screen, click on the “Close” button at the bottom of the screen to return to the Family Services Selection Guide.



### Cremation Information - \*Optional Screen

To access this screen, click on the word Cremation to the left on the Family Services Selection Guide. This screen provides the opportunity to discuss service options available with cremation. Click on “close” at the bottom of the screen to return to the Family Services Selection Guide.



### Services - \*Optional Screen

The purpose of this screen is to provide information and answer questions regarding the value of the four primary services. The screen offers the following selections: Viewing, Funeral Ceremony, Memorial Services, and Graveside Services. A brief summary and corresponding video can be found on each type of service by clicking on the individual selection. The video segments of Professor Ken Czillinger, a Bereavement Consultant, discuss the value of the different available services. To activate the video segment click on the play button under the video screen.



Play

You also have the option to stop or pause the video by clicking the pause button.



After viewing the desired selections click “close” at the bottom of the screen. This will return you to the Family Services Selection Screen. These videos may or may not be shown; the funeral director should use judgment with the family.

<b>Viewing</b> For some families, the viewing is a step in the emotional recovery process. This gathering, whether private or public, of family or friends surrounds you with the support and understanding you need. While the viewing is not necessary for all families, it can assist in the grieving process.	<b>Funeral Ceremony</b> The funeral service is the ceremony in which you mourn and celebrate a life lived. It provides the opportunity to honor a loved one, and to preserve the memories brought forth by the deceased.	<b>Memorial Service</b> Sometimes people are surprised to learn that they may have a memorial service before or after burial or cremation. This ceremony is an important part of the healing process, as it allows family and friends to gather for a time of remembering.	<b>Graveside Service</b> Family and friends gathering at the cemetery for a short memorial service may be perfectly appropriate. A graveside service can be held in conjunction with a viewing and funeral ceremony or can serve as the only service.
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## Select Services

Continuing from the Family Services Selection Guide, this area shows a list of all the services available including the cost of the specified service. It is broken into the package, service, facilities and merchandise categories you created during Service Setup. It is your general price list.

To select the desired services, click on the circle to the left. Once your choice has been highlighted and the Aurora logo appears, the system automatically calculates the selected services' price. The “TOTAL”, located at the bottom of the list, will automatically recalculate pricing and tax after each product selection.

You can also adjust the Actual Price. Changes to Actual Price must be made **before** selecting the service. The total and tax will adjust after you have selected the service.

If you entered service descriptions during setup, they can be accessed by clicking on the name of the service. To exit the description, click on “Close”.

Once the family has chosen the desired services, click “Save & Continue”. To deselect a service, simply click again. The Aurora logo and highlighted line will disappear. The total will be adjusted accordingly.

Service	List Price	Actual Price
<input checked="" type="radio"/> Embalming	\$495.00	\$495.00
<input type="radio"/> Air Shipping Container	\$105.00	\$105.00
TOTAL:		\$495.00
TAX:		\$24.75

**Note:** This is a sample screen, the screen that you will see will contain your service descriptions and pricing.



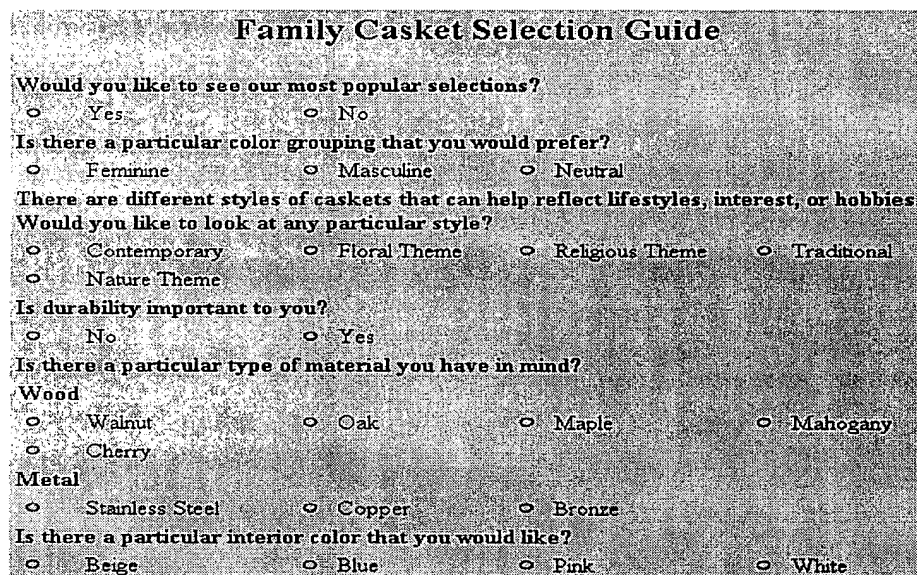
## Family Casket Selection Guide

The Family Casket Selection Guide enables a family to view your most popular casket selections or to select a casket based on interests, hobbies, and preferences. This method of selecting a casket allows the family to select a casket in familiar terms. In addition, it gives them the perception that they are “customizing” the casket.

To view the most popular casket selections, answer “Yes” to the first question. Your most popular caskets will appear in price descending order. If none of the popular caskets appeal to the family, return to the selection guide by choosing “Casket Guide” on the toolbar and changing your selection criteria.

To narrow the search for the most appropriate casket, answer one or more of the questions. You may choose multiple selections for each question. **Note:** If you do not answer any of the questions, all of the products that you have selected as part of your “virtual inventory” will be shown. This can be overwhelming to a family. Consumer research has shown that families prefer to choose from no more than 10 caskets. However, by answering all questions in the Selection Guide, you run the risk of not having any selections appear. Answer only those questions important to the family.

To select the desired response to each question, click on the circle located to the left of each option. The Aurora logo will appear to indicate your selection. Once the preferences have been highlighted, click “continue”.



**Family Casket Selection Guide**

Would you like to see our most popular selections?

☐ Yes ☐ No

Is there a particular color grouping that you would prefer?

☐ Feminine ☐ Masculine ☐ Neutral

There are different styles of caskets that can help reflect lifestyles, interest, or hobbies. Would you like to look at any particular style?

☐ Contemporary ☐ Floral Theme ☐ Religious Theme ☐ Traditional

☐ Nature Theme

Is durability important to you?

☐ No ☐ Yes

Is there a particular type of material you have in mind?

**Wood**

☐ Walnut ☐ Oak ☐ Maple ☐ Mahogany

☐ Cherry

**Metal**

☐ Stainless Steel ☐ Copper ☐ Bronze

Is there a particular interior color that you would like?

☐ Beige ☐ Blue ☐ Pink ☐ White

## Casket Information - \*Optional Screen

The Casket Information screen gives you the opportunity to educate the family on casket material options. The family can learn about the types of metal or species of wood. This area also includes video clips on the manufacturing process to demonstrate the value of the product.

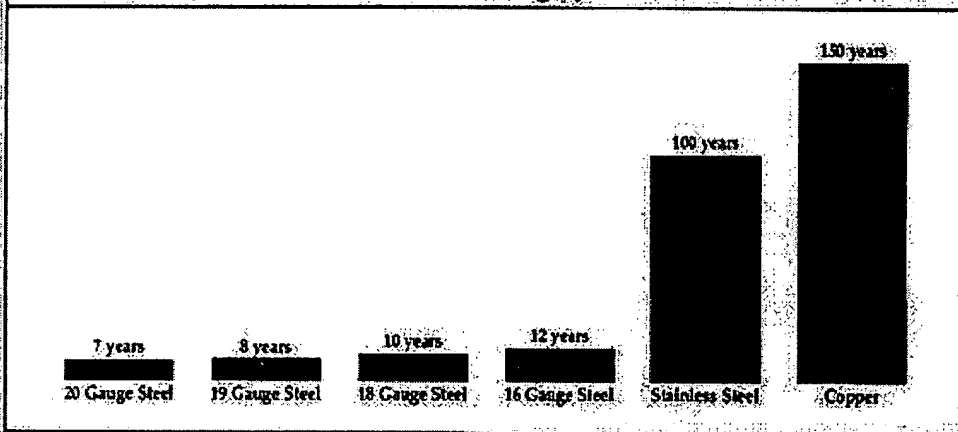
## Casket Information

There are important differences between caskets that should be noted prior to selecting the most appropriate one. The two distinct groups of caskets are metal and hardwood.

There are four types of metal caskets—solid bronze, solid copper, stainless steel, and carbon steel. They range in durability as well as price, with bronze and copper being the most durable, therefore the most expensive. The type of metal, the casket shell design, and the interior fabric determine the price.

### Independent Test Comparison

Exterior Material  
Years of Integrity



The hardwood caskets consist of many different types of wood. The price is determined by the specific type of wood, the casket shell design, and the fabric used to make the interior.

The interior fabrics, of metal and wood caskets, are available in velvet, velour, crepe and satin. Through head panels and hardware, some caskets reflect a theme such as nature, floral, and religious.

Metal Casket Information

Close

Wood Casket Information

To learn more about a specific type of material, click on the “metal” or “wood” icon. By choosing either of these options, you will enter an area that supplies more information about the chosen type of casket. In addition, there is a sample of each material category. To view the sample image, click on the material type. To view the video clips, click on the button

next to the video description. The video clip will appear in the view box. **Note:** Consumer research indicates that this area is helpful in making pre-need arrangements. It serves as a good discussion area to inform the family of their options.



When you are finished viewing the desired information, click “Close” to return to the casket selection guide screen. Click “Continue”.

## Casket Selection

The casket selection screen allows you to view the available caskets, based on the choices in the selection guide, in order of highest to lowest price. This allows you to show the family the highest priced casket in that category (which would be the first selection), and the lowest priced casket, by toggling back one selection. Inside the toggle arrows, there will be a total number of caskets selected.

To move from one casket to the next, click on the arrows on the bottom right of the screen. You can toggle back and forth as often as you desire. The price of the casket, the services total, including tax and the grand total appear only if yes is chosen to display totals in setup area. If no, only the price of the casket will be displayed. The product description and material type appear under the picture of the casket.

You can view close-ups of the hardware and the interior panel by clicking on the lower right hand corner for hardware or on the interior panel to view the panel. To return to the full casket view, click in the upper right hand corner.

When the family selects the desired casket, make sure the picture of the desired casket is displayed on the screen and select “Choose Casket” on the toolbar.



If none of the caskets selected meet the families’ satisfaction, then return to the selection guide by choosing “Casket Guide” on the toolbar and changing your selection criteria.

## Summary

The “Summary” screen provides a recap of the services and product that the family has selected. If there are cash advance items, enter the cost(s) directly on the summary page. Total cost will be recalculated automatically as you tab from each entry. You can also add products and services that your funeral home provides. Click on the blank line under Service or Product to enter your selection. Be sure to include a price. You must tab out of the price box in order for the total price to recalculate including the new item(s) added.

# Aurora Casket Company

Name: Blow, Joe

Account/ID Number: 1234

Service	Qty.	Each	Cost
Traditional Funeral Offering	1	\$2,555.00	\$2,555.00
Test Service	1	\$500.00	\$500.00
Embalming	1	\$495.00	\$495.00
Service Tax:			\$177.50
Service Total:			\$3,727.50
Product	Qty.	Each	Cost
2298 Coral Mist 2704 Pink Premium Velvet	1	\$5,000.00	\$5,000.00
A Test Product	1	\$100.00	\$100.00
2889 Regal Brushed 2490T Sandalwood Premium Velvet GM	3	\$5,000.00	\$15,000.00

After reviewing the summary, click "Save & Continue". The "Print" screen will appear. Review all "Print" options insuring they are correct. Click "OK". A copy of the contract will print with the summary. After the summary and contract are printed, please click on the "Order/Update" button on the toolbar.

If you do not want to print the summary, simply select cancel. A pop-up screen will appear that indicates that nothing was printed, simply select "ok".

## Order Update

After clicking on Order/Update, your customer's name and product will appear. If you have not recently uploaded any orders, multiple customers may show in a list.

Order / Update	
Select Customer	Products
Barnes, Kennedy	3887 Canyon Amber Brushed 1409 Pearl Premium Velvet GM
	2357 Vintage Sierra Brushed 1524C Pearl Premium Velvet
Bophea, Sheela	2889 Regal Brushed 2490T Sandalwood Premium Velvet GM

Upload Orders

Click on your customer's name. This area of the system allows you to review your order, specify delivery information or special instructions and place the order on-line. Many of the fields will automatically populate based on the selections that were made during the arrangement process.

Order Now:	Yes <input checked="" type="checkbox"/>
Arrangement Type:	At-Need
Customer Number:	155510
Customer Name:	Kennedy Barnes
Product Code:	A38605
Description:	3887 Canyon Amber Brushed 1409 Pearl Premium Velvet GM
Quantity:	1 Set to 0 to Delete
Normal Delivery:	Yes <input checked="" type="checkbox"/>
If No What Time:	
Special Instructions:	Bring to back of building and ring buzzer!
Insurance Company:	Fortis
Policy Number:	4537
Date Of Contract:	12/1/98
P.O.:	34
Arranger:	William Buford, Jr.
Account Number:	10
Ship To:	Aurora Casket Company Shipping Dock <input checked="" type="checkbox"/>
Phone Number:	812-926-1111

**Order Now** – will default to Yes. If you do not want to order now, simply select No by using the down arrow to the right of the field. However, realize that Aurora will not receive the order online if you select no.

**Arrangement Type** – will automatically populate based on what was entered on the biographical information screen.

**Customer Number** – will automatically populate based on account ID entered on biographical information screen.

**Customer Name** – will automatically populate based on Name field entered on biographical information screen.

**Product Code** – will automatically populate based on product selected

**Description** - will automatically populate based on product selected

**Quantity** – will automatically populate based on number of products selected, but can be edited.

**Normal delivery** – will default to yes. You can choose no by using the down arrow to the right of field.

**If No, what time** – please enter the desired delivery time, if you chose No in the normal delivery field.

**Special Instructions** – note any special instructions that Aurora will need to know regarding this order.

**Insurance Company** – please complete for pre-need – will automatically populate if this was completed on the biographical information screen.

**Policy Number** – please complete for pre-need – will automatically populate if this was completed on the biographical information screen.

**Date of contract** – Enter date of pre-need contract

**P.O.** – key in purchase order number, if applicable

**Arranger** – enter arranger/contact name

**Account Number** – This is your funeral home's account number with Aurora. This field will automatically populate based on set up screen.

**Shipping To** – automatically defaults to shipping location 1, however, you can choose other locations by using the down arrow to the right of the field.

**Phone number** – will automatically populate based on set up screen information.

When the order information is complete, click on “submit order” at the bottom of the screen. You may submit multiple orders. Your customer will be removed from the order/update screen and be pending upload to Aurora. After submitting your orders, click on “upload” to send your orders to Aurora. **Submitting and uploading orders is a two step process.** “Submit” creates a file for the Aurora computer system to read. “Upload” actually *sends* the order from your computer to Aurora. **Note:** If you are using a modem with dial-up networking, you should see the dial-up networking box and hear the system dial. If you are using a LAN, multiple windows will open at the bottom of your screen.

You may only upload orders **once** every 30 minutes. **Uploading multiple, individual orders within one 30-minute period will result in the cancellation of the prior order.** You will receive an email confirmation at approximately 30 minutes after the upload.

If you prefer to order by calling Aurora Answers, simply enter a “0” in the quantity field and click on submit orders. This action will delete the order.

### **Cremation:**

If cremation is chosen on the Family Services Selection Guide, then the system process will be as follows:

### **Select Services**

This area shows a list of all the services available, including the cost of the specified service. It is broken into the package, service, facilities and merchandize categories you created during Service Setup. It is your general price list.

To select the desired services click on the circle to the left. Once your choice has been highlighted and the Aurora logo appears, the system automatically calculates the selected services' price. The “TOTAL”, located at the bottom of the list, will automatically recalculate pricing and tax after each product selection

You can also adjust the Actual Price. Changes to Actual Price must be made **before** selecting the service. The total and tax will adjust after you have selected the service.

If you entered service descriptions during setup, clicking on the name of the service can access them. To exit the description, click on “Close”.



Once the family has chosen the desired services, click “Save & Continue”. To deselect a service, simply click again. The Aurora logo and highlighted line will disappear. The total will be adjusted accordingly.

Service	List Price	Actual Price
<input checked="" type="radio"/> Embalming	\$495.00	\$495.00
<input type="radio"/> Air Shipping Container	\$105.00	\$105.00
TOTAL:		\$495.00
TAX:		\$24.75

**Note:** This is a sample screen, the screen that you will see will contain your service descriptions and pricing.

### Family Cremation Casket Selection Guide

The Family Cremation Casket Selection Guide enables a family to select a casket based on interests, hobbies, and preferences. This method of selecting a casket allows the family to select a casket in familiar terms. To narrow the search for the most appropriate casket, answer one or more of the questions. You may choose multiple selections for each question. **Note:** If you do not answer any of the questions, all of the products that you have selected as part of your “virtual inventory” will be shown. This can be overwhelming to a family. Consumer research has shown that families would like to see no more than 10 caskets from which to choose. However, by answering all questions in the Selection Guide, you run the risk of not having any selections appear. Answer only those questions important to the family.

To select the desired response to each question, click on the circle located to the left of each option. The Aurora logo will appear to indicate your selection. Once the preferences have been highlighted, click “continue”.

### Casket Information - \*Optional Screen

To access this screen, click on the cremation casket information on the toolbar. This screen provides information on the types of cremation caskets available to the family.

### Cremation Casket Selection

The casket selection screen allows you to view the available caskets, based on the choices in the selection guide, in order of highest to lowest price. This allows you to show the family the highest priced casket in that category (which would be the first selection), and the lowest priced casket, by toggling back one selection. Inside the toggle arrows, there will be a total number of caskets selected. To move from one casket to the next, click on the arrows on the bottom right of the screen. You can toggle back and forth as often as you desire. If you have setup total prices to be shown, the price of the casket, including tax, the services total including tax and the grand total appear under the toolbar. The product description and material type appear under the picture of the casket.



When the picture of the desired casket appears, click “Choose Casket” on the toolbar.



## Family Cremation Urn Selection Guide

The Family Cremation Urn Selection Guide enables a family to select an urn based on interests, hobbies, preferences, and desired disposition of the cremated remains. This method of selecting an urn allows the family to select an urn in familiar terms and which makes sense for its ultimate use. To narrow the search for the most appropriate urn, answer one or more of the questions. You may choose multiple selections for each question. **Note:** If you do not answer any of the questions, all of the products that you have selected as part of your “virtual inventory” will be shown. This can be overwhelming to a family. Consumer research has shown that families would like to see approximately 20 urns or less from which to choose. However, by answering all questions in the Selection Guide, you run the risk of not having any selections appear. Answer only those questions important to the family.

A screenshot of the Family Cremation Urn Selection Guide form. The form has a dark, textured background with white text. It contains several questions with radio button options.

**Family Cremation Urn Selection Guide**

Would you like to see our most popular selections?

☐ Yes ☐ No

Is there a particular color grouping that you would prefer?

☐ Feminine ☐ Infant ☐ Masculine ☐ Neutral

There are different styles of urns that can help reflect lifestyles, interest, or hobbies.

Would you like to look at any particular style?

☐ Nature Theme ☐ Traditional ☐ Basic ☐ Floral Theme

☐ Religious Theme ☐ Contemporary

Is there a particular type of material you have in mind?

**Wood**

☐ Walnut

**Metal**

☐ Sheet Bronze

Where do you intend to place the cremated remains?

☐ Urn Niche ☐ Bury ☐ In the Home

## Urn Information - \*Optional Screen

To access this screen, click on the words Urn Information on the toolbar. This screen offers valuable information on the types of urns available and what a family may want to consider when selecting an urn. In addition, this screen also offers a video segment on the manufacturing process of an urn. This video segment assists in demonstrating the value of the products. After reviewing this screen click on the close button at the bottom of the screen to return to the Urn Selection Guide.

An urn is a permanent memorial container to hold the cremated remains after the cremation has taken place. Urns are available in a variety of shapes, styles, and materials. Popular materials used to make urns are stainless steel, wood, ceramic, pewter, cloisonné, bronze, and many others. Bronze is the most permanent and highest quality of all urn materials.

The choice of urn that your family selects can be based on several factors, the most important of which is where the urn will ultimately be kept. Some urns are designed as works of art to be kept at home, while others are designed to be placed in an urn niche or used for burial.

To find out how cremation urns are made, click on the button for more information.

## Urn Selection

The urn selection screen allows you to view the available cremation urns in order of highest to lowest price. The number inside the toggle arrows indicates how many urns meet the family's selection. To move from one urn to the next, click on the arrows on the bottom right of the screen. When the picture of the desired urn appears, click "Choose Urn".

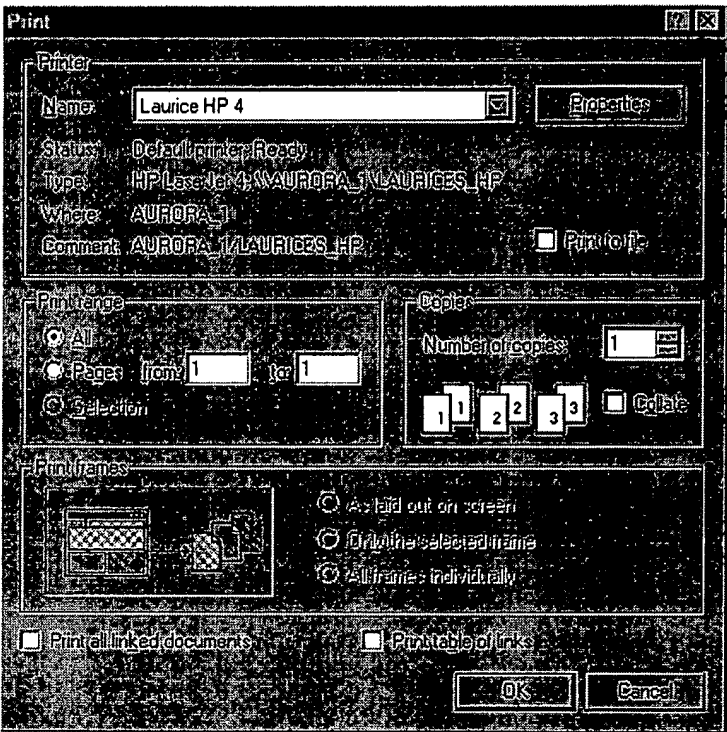
## Summary

The "Summary" screen provides a recap of the services and product that the family has selected including quantity and cost. After reviewing the summary, click "Save & Continue". The "Print" screen will appear.

Product	Qty.	Each	Cost
2298 Coral Mist 2704 Pink Premium Velvet	1	\$5,000.00	\$5,000.00
A Test Product	1	\$100.00	\$100.00
2889 Regal Brushed 2490T Sandalwood Premium Velvet GM	4	\$5,000.00	\$20,000.00
Sanctuary Walnut	3	\$360.00	\$1,080.00
Bracondale Solid Mahogany Silver Beige Velvet	1	\$2,000.00	\$2,000.00
	1	0	\$0.00
	1	0	\$0.00
	1	0	\$0.00
Product Tax:			\$1,409.00
Product Total:			\$29,589.00
SUBTOTAL:			\$32,796.75

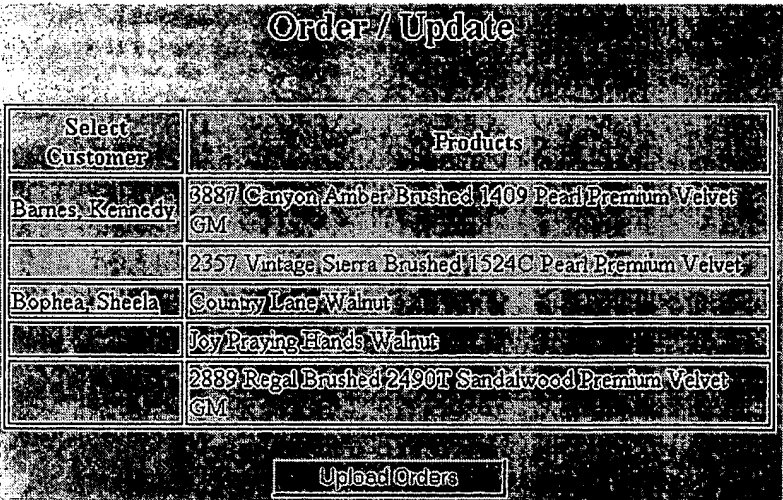
Review all "Print" options insuring they are correct. Click "OK". A copy of the contract will print with the summary. After the summary and contract are printed, please click on the "Order/Update" button on the toolbar.

If you do not want to print the summary, simply select cancel. A pop-up screen will appear that indicates that nothing was printed, simply select “ok”.



Order/Update

After clicking on Order/Update, your customer’s name and product will appear. If you have not recently uploaded any orders, multiple customers may show in a list.



Click on your customer's name. This area of the system allows you to review your order, specify delivery information or special instructions and place the order on-line. Many of the fields will automatically populate based on the selections that were made during the arrangement process. If the urn is to be inscribed (personalized), please type the inscription in the Special Instructions field.

Order Now:	<input checked="" type="checkbox"/> Yes
Arrangement Type:	At-Need
Customer Number:	45091
Customer Name:	Sheela Bophea
Product Code:	3WW710
Description:	Country Lane Walnut
Quantity:	1 Set to 0 to Delete
Normal Delivery:	<input checked="" type="checkbox"/> Yes
If No What Time:	
Special Instructions:	
Insurance Company:	
Policy Number:	
Date Of Contract:	
P.O.:	
Arranger:	
Account Number:	10
Ship To:	Aurora Casket Company Shipping Dock <input checked="" type="checkbox"/>
Phone Number:	812-926-1111

**Order Now** – will default to Yes. If you do not want to order now, simply select No by using the down arrow to the right of the field. However, realize that Aurora will not receive the order online if you select no.

**Arrangement Type** – will automatically populate based on what was entered on the biographical information screen.

**Customer Number** – will automatically populate based on account ID entered on biographical information screen.

**Customer Name** – will automatically populate based on Name field entered on biographical information screen.

**Product Code** – will automatically populate based on product selected

**Description** - will automatically populate based on product selected

**Qty** – will automatically populate based on number of products selected, but can be edited

**Normal delivery** – will default to yes. You can choose No by using the down arrow to the right of field.

**If no, what time** – please enter the desired delivery time, if you chose No in the normal delivery field.

**Special Instructions** – note any special instructions that Aurora will need to know regarding this order.

**Insurance Company** – please complete for pre-need – will automatically populate if this was completed on the biographical information screen.

**Policy Number** – please complete for pre-need – will automatically populate if this was completed on the biographical information screen.

**Date of contract** – Enter date of pre-need contract

**P.O.** – key in purchase order number, if applicable

**Arranger** – enter arranger/contact name

**Account Number** – This is your funeral home's account number with Aurora. This field will automatically populate based on set up screen.

**Shipping to** – automatically defaults? To shipping location 1, however, can choose other locations by using the down arrow to the right of the field.

**Phone number** – will automatically populate based on set up screen information.

When the order information is complete, click on “submit order” at the bottom of the screen.

You may submit multiple orders. Your customer will be removed from the order/update screen and be pending upload to Aurora. After submitting your orders, click on “upload” to send your orders to Aurora. **Submitting and uploading orders is a two step process.**

“Submit” creates a file for the Aurora computer system to read. “Upload” actually *sends* the order from your computer to Aurora. **Note:** If you are using a modem with dial-up networking, you should see the dial-up networking box and hear the system dial. If you are using a LAN, multiple windows will open at the bottom of your screen.

You may only upload orders **once** every 30 minutes. **Uploading multiple, individual orders within one 30 minute period will result in the cancellation of the prior order.**

You will receive an email confirmation approximately 30 minutes after the upload.

If you prefer to order by calling Aurora Answers, simply enter a “0” in the quantity field and click on submit orders. This action will delete the order.

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